

KEY POINTS FOR GUARDIANS

- Court order defines the scope of a guardian's authority
- Have court order readily available
- Keep a calendar of report due dates
- Begin compiling information for the inventory
- Create a system for record-keeping
- Do not open a joint account
- Do not deposit the incapacitated person's money with the guardian's personal account
- Do not mix the incapacitated person's money with the guardian's money
- Avoid paying the incapacitated person's bills with the guardians' money and then seek reimbursement
- Develop working relationships with service providers
- Seek ongoing participation in plan of care and treatment team meetings
- Request a copy of the plan of care and medication list
- Identify consistent contact person
- Provide written request to service providers indicating information needed and reporting of status changes
- Request to review health care and treatment records as needed
- Request information needed for informed decision-making, including risks, benefits and alternatives
- Ask questions to determine if the incapacitated person is receiving appropriate care and treatment
- Identify concerns you want to address
- Seek court approval as specifically required
- Advocate for the incapacitated person
- Understand the distinct difference between your role as family member/significant other and the duties and responsibilities of being a guardian